

My Page Title

SharePoint Document Management

Option 1:

SharePoint on premises + office web app

(DODD own SharePoint 2013 enterprise edition CAL and no license required for external users)

DODD needs to handle with SharePoint web application, maintenance, backup and disaster recovery.

Option 2:

SharePoint online (Cloud)

Still the users will login to our portal and through claims get the link to the SharePoint online sites.

Option 1 is on premises document management for county boards:

Either individual site collection or separate site will be concluded based on volume of documents and privacy for each county.

SharePoint Advantages:

- Collaboration
- check-in checkout
- Publish
- Single instance storage
- SharePoint handles documents in 50 – 300 mb size

- Can handle up to 2 GB with configuration modification .

When should replace file server?

- When the files need to be accessed over HTTP or HTTPS
- When the files need to be managed in a DMS(Document Management System)
- When the files need to be engaged in a collaboration process
- When your document life cycle are completed and reflected in technical requirements for SharePoint (document approval)

For DC's:

County boards can access SharePoint document libraries either from the top links or from the drop down after login into DODD portal.

Security:

- The links will be visible based on the claims for the county boards (Claim based authentication).
- ADFS claims will get the user type for county boards and the attributes which has county id will be returned from ADLDS.
- Portal code needs little change to include county links and check for claim values.

Site collection admin has the below access

Site owner has the below rights

- Site collection admin/owner can give permission to users within their county.

What we can do with SharePoint for document management (OOTB feature)?

Listed below are all OOTB feature from SharePoint 2013.

- Each county can have its own separate site collection with county site admin with claims based authentication.
- Site Collection admin has full control over the counties site
- Can create top level sites and sub sites for document library

Can choose any Document template for document library

- Use metatags/columns to tag documents rather than creating network drives .
- Can create as many views for the document library and edits
- Can change the look and feel of their own counties site

- Can set alerts about the document
- Can set email alerts of a site changes immediate notification, daily basis or weekly basis.

- Can create OOTB workflow for document approval

To manage document life cycle complete.

- Enable versioning

With versioning enabled users can checkout, edit and check-in with minor/major versions and compare with changes in documents with version history.

- Can use online recycle bin to restore any items deleted .
- Targeting specific audience
- Document library advanced settings
- Can easily import and export to Excel the document list items
- Can view in explorer
- Can open documents in browser
- Can have custom columns and content types for documents

Document library: (based on permissions)

- Can maintain custom site columns and site content types
- Can customize view what metadata of the document need to show up.
- Can download a copy
- Can generate documents file plan report
- Can create workflow to document approval (Out of the box)

Content rollup web part:

Can have content rollup web parts to view the recently added documents county wise for the admins.

Search Service applications:

- Set search rules

Counties can use SharePoint out of the box search center for document search .Can view document pages on mouse over.

Document can be indexed.

Site admin can set search rules like what under search and what to restrict in search results.

Search by Document ID:

Document ID service available in SharePoint so that documents are created with unique ID and can search using document ID regardless of knowing actual location.

Office web APPs with SharePoint 2013: (browser based version of office documents)

You can view documents on browser, edit online and check-in documents to SharePoint without downloading it to local system. Also the user doesn't need office installed in his/her machine to work with office documents .Everything is browser based.